
WealthCraft

Importing Leads Process Guide

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Part 1 – Populating the Lead Information

Firstly, you will need to download the **Lead Import Template** from the WealthCraft Support Material page which can be accessed via your adviser landing page or by clicking on the following link:



After you have downloaded the XLS Spreadsheet, the following document will be displayed:

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	Salutation	First Name	Last Name	Job Title	Company Name	Client Name	Business Phone	Home Phone	Mobile Phone	Email	Country	Description	Lead Status	Lead Source	Original Owner
2															
3															

Enter all the information you know about the lead in the relevant fields. Below is the minimum fields that will need to be populated in order for the import to be successful:

- **First Name**
- **Last Name**
- **Contact Number (i.e. Business/Home Phone)**
- **Owner**

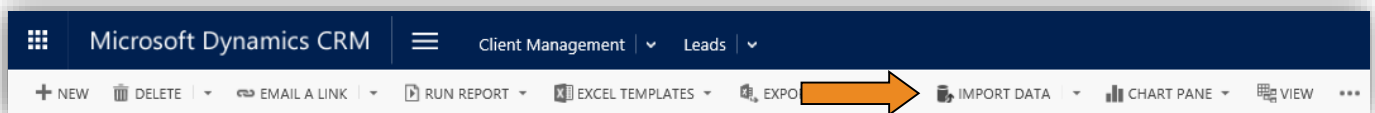
Once you have finished entering all the required information, save the document as a 'XML Spreadsheet 2003'. You are then ready to import the leads into the system.

Part 2 – Importing Leads

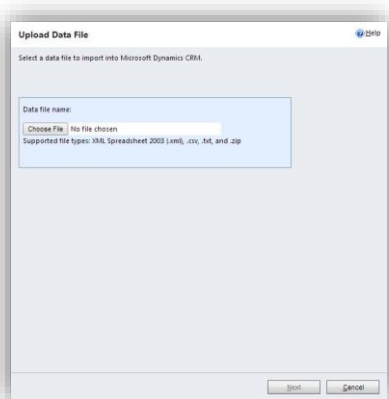
In order to successfully import leads into WealthCraft, follow the below steps.

From any screen in the system select **Microsoft Dynamics CRM > Client Management > Leads**.

Now select **Import Data**.



A new window will appear allowing you to choose a file to upload. Select the XML Spreadsheet 2003 file that you created in Part 1 and click **Next**.



A new screen will appear reviewing the files you are trying to upload. If you are happy with the summary of files, click **Next**.

You will then be asked to ensure that all the data is being mapped to the correct formatting for WealthCraft. To do this, select **Lead – NEW** underneath the **Customized Data Maps** heading and click **Next**.

Select Data Map Help

Before your data can be imported, it must be mapped to the data in Microsoft Dynamics CRM. You can let the system map your data automatically, or you can select a data map to specify how your data will be imported.

- Account 6
- account 7
- account 8
- Accounts import
- Alan Shearer Event Data
- Alan Shearer Event QAR
- American Seminar 01.12.14
- Appointment
- appointment3
- Client Group
- Email
- GWM TEST EMAIL
- Investor import
- Lead
- Lead - NEW**
- notes 1
- Phone Call
- Phone Call2
- phone call3
- phone call4
- Task
- Task2
- Task3
- Task5
- Task6
- Temp
- temp 2
- temp 3
- temp cg
- Test Email

Back Next Cancel

You will then see the Review Mapping Summary screen – click **Next**.

Review Mapping Summary Help

The data from the source files has been successfully mapped to the target record types and fields in Microsoft Dynamics CRM. The data is ready to import.

Source Data Files	Microsoft Dynamics CRM Record Types
✓ lead-import-templatev3.xml	Lead

Edit

⚠ Data in any record types or fields that are set to ignore will not be imported. To view or change the record type and field mappings, click Edit.

Back Next Cancel

In the Review Settings and Import Data page, ensure that No is selected in the Allow Duplicates section. Click **Submit**, then click **Finish**.

Review Settings and Import Data

Review the default settings, make the necessary changes, and submit the data for import.

Allow Duplicates

☒ No
☐ Yes
 Duplicate records will be determined based on the duplicate detection settings in Microsoft Dynamics CRM.

Select Owner for Imported Records

Consultant Guardian

This user will own the imported records if the records do not contain owner information or if the records cannot be assigned to the specified owners.

Data Map Name (optional)

Save this data map for future imports.

Back Submit Cancel

Part 3 – Reviewing the imported records

You can review the records that were imported by going to **Microsoft Dynamics CRM > Settings > Data Management > Imports**.

Import Name	Status Reason	Successes	Partial Failures	Errors	Total Processed	Created On	Created By
Lead - Jonathan Smith.xml	Completed	1	0	0	1	01/08/2014 11:30	BuisAdmin Guk...

Locate the import you wish to review and then click on the import name to open it.

Import Name	Status Reason	Successes...	Partial Failures	Errors	Total Proc...	Created On	Created By
lead-import-templatev3.xml	Completed	1	0	0	1	18/04/2016 21:18	Wealthcraft Ad...

You can drill down to see those leads that were fully imported or failed by clicking on the relevant section.

Import Source File: Information

General

Related

- Common**
 - Leads Fully Imported
 - Leads Partially Import...
 - Failures
- System Jobs**
 - System Jobs

Import Source File: Information

lead-import-templatev3.xml

General

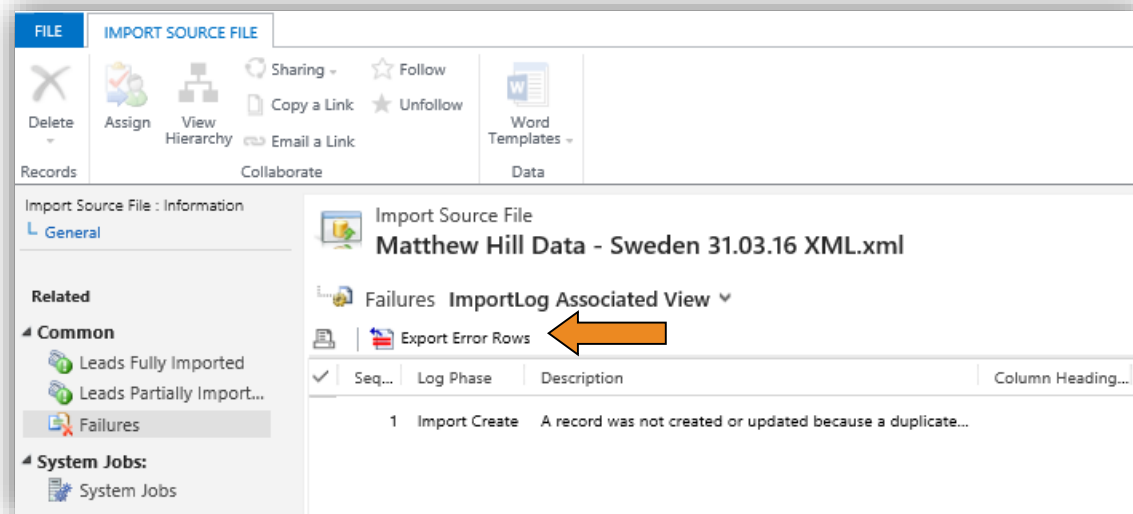
Name: lead-import-templatev3.xml

Created By: Wealthcraft Admin

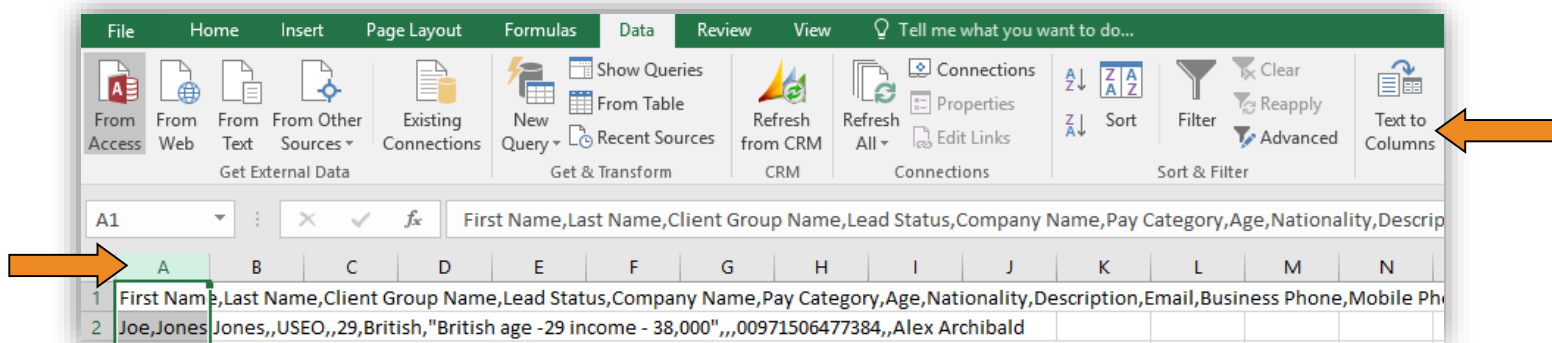
Created On: 18/04/2016

Properties

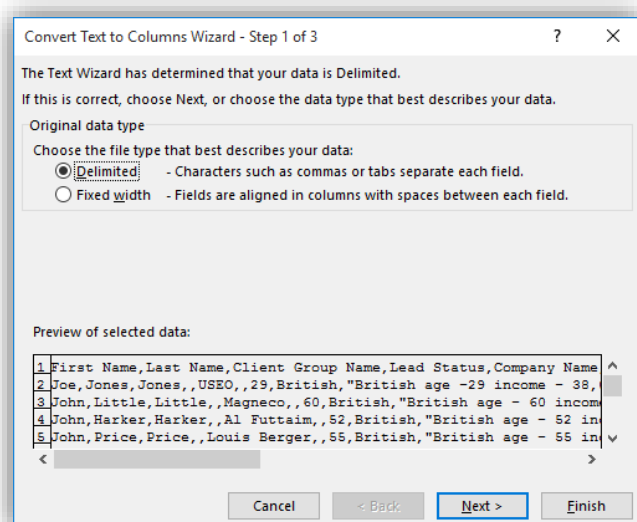
To extract the failed records click on **Failures**. Now click on **Export Error Rows**.



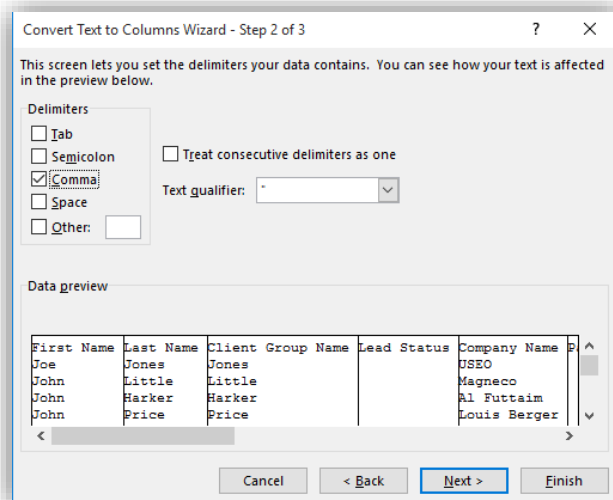
A spreadsheet will open and require some minor formatting. Highlight column A then select **Data**, then **Text to Columns**



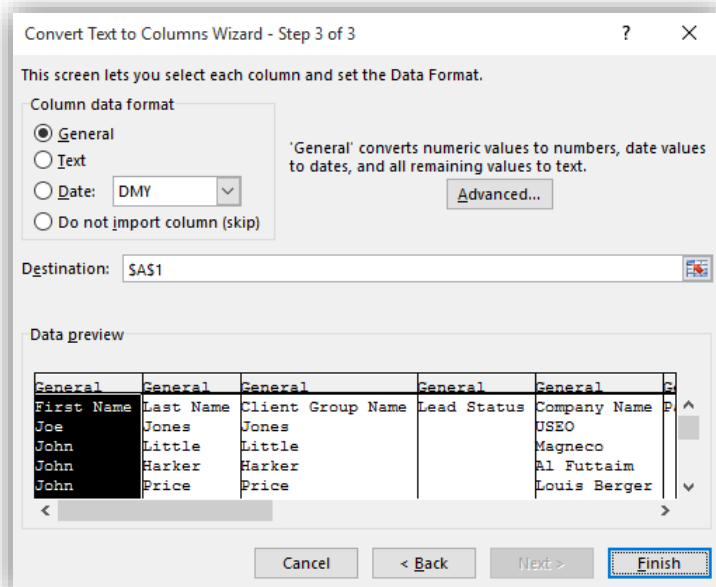
Choose **Delimited**, then Next



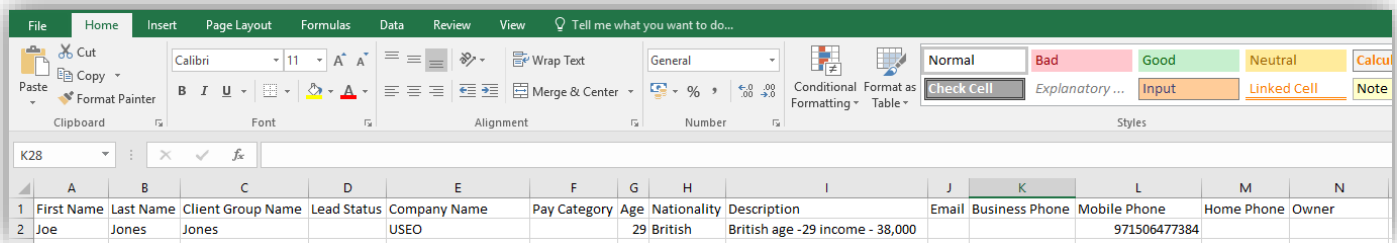
Ensure only **Comma** is selected.



The next screen should appear as so by default. If not, then amend accordingly and click **Finish**.



You will now have a formatted spreadsheet that can be sent to the person requesting the upload.



The user can then create these leads manually at which point WealthCraft will identify the duplicate. If the existing Lead record is owned by the relevant lead pool the user can reassign it to themselves so they can proceed.